

PX23

PX23 Attachment B

Emails obtained from Brook Nelson's workstation

**Brooke Nelson**

**From:** Danielle Foss <danielle@bluerocketbrands.com>  
**Sent:** Monday, June 5, 2017 1:25 PM  
**To:** chris@bluerocketbrands.com; 'Ryan McWilliams'; Emily McEvoy; Lindsey Martinez; 'Megan Nosel'; seth; Stelios Cabrera; 'Brian Lint'; 'Sarah Austin'; 'Kayla'; Brooke Nelson; Jade Raber  
**Subject:** New Product Launch: SpartanMax  
**Categories:** Follow up (Action item)

BRB, RevGuard, RevLive, and RevGo Teams,

Here is the new brand checklist for our first muscle brand, Spartan Max. Everyone, please take a look at the items listed under your name and tell me what needs added/removed/updated on your lists. This product will be launching in Konnektive only (no Mona).

Anything you need changed, please send those details over to Emily and myself ASAP. This list is meant to work for you guys, so make it look the way you want/need for your specific items.

For anything listed here that has a note of "2 weeks from launch", I will send another email out to everyone once we are at that point. The rest of it is needed at everyone's earliest opportunity.

FYI, you will be seeing several of these new brand requests from us over the next 2-4 weeks. Thank you!

|       | SpartanMax  | Done | Notes   |
|-------|---|------|---------|
| Chris | Purchase Domain + Privacy   | X    |         |
|       | Create emails: customerservice, donotreply. Send logins to Kayla          |      |         |
|       | Create complaints email and fwd to master complaints email for Lindsey    |      |         |
|       | Design Logo   |      | In Jira |
|       | Create Product Shot   |      |         |
|       | Add png product shots to dropbox  |      |         |
|       | Send Product Shots to RevGuard & RevLive                                  |      |         |
|       | Design Brochures/Inserts  |      |         |
|       | Design Home Page  |      |         |
|       | Setup new SSL cert with DigiCert  |      |         |
|       | Point domain name to correct place  |      |         |
|       | QC/Test Home Page...desktop & mobile                                      |      |         |
|       | Add Domain to Wormly  |      |         |
|       | Build DBA site for Processing Team/GoDaddy SSL, Amazon Server, dba emails |      |         |
|       | Create/Add landing pages to Mona  |      |         |
|       | Update LPs and Home page w/ RG 1800 #'s                                   |      |         |
|       | QC/Test Home Page...desktop & mobile                                      |      |         |

|                |   |   |                     |
|----------------|---|---|---------------------|
| Dani/Emily     | Setup new domain in Mona  |   |                     |
|                | Setup new campaign in Konnektive                                |   |                     |
|                | Add 1800# to Domain Menu  |   |                     |
|                | Setup Offers in Konnektive (Regular, Home, SS)                  |   |                     |
|                | Setup Matching Promotions in Mona                               |   |                     |
|                | Send Sarah New Brand Questionnaire                              |   | 2 weeks from launch |
|                | Send Sarah & Kayla Save Sale Promo IDs                          |   |                     |
|                | Setup Products in Konnektive                                    |   |                     |
|                | Add RevGo Brand ID to Konnektive                                |   |                     |
|                | Send Sarah and Lindsey Test Link                                |   |                     |
|                | Setup auto responders in Konnektive                             |   |                     |
| Lindsey        | Setup BBB in respective state (WY)                              |   | 2 weeks from launch |
| Megan          | Confirm brand is available and without TMs                      | X |                     |
|                | Order product brochures/inserts                                 |   | 2 weeks from launch |
| Seth           | Submit DBA Requests to Chris                                    |   |                     |
|                | Submit new application(s)                                       |   |                     |
|                | Work with Gateway to activate approved accounts                 |   |                     |
|                | Add merchants in Konnektive                                     |   |                     |
|                | Place Live Test Orders on new accounts                          |   |                     |
|                | QC Descriptors  |   |                     |
|                | Setup CDRN with Verifi  | ? |                     |
|                | Setup MIDs with Midigator                                       |   |                     |
| Stelios        | Setup DBA with respective Reseller (Wrangler)<br>DBA State = WY |   |                     |
|                | Setup Operating Agreement                                       | ? |                     |
|                | Complete Articles of Organization                               | ? |                     |
|                | Send Ryan Articles of Org for SSL                               | ? |                     |
| Brian/RevGo    | Send Dani Master Sku ID   |   |                     |
|                | Send Dani RevGo Brand ID  |   |                     |
|                | Send Dani RevGo Client ID                                       |   |                     |
|                | Confirm product has been received in warehouse                  |   |                     |
| Sarah/RevGuard | Create US/UK DBA 1800# for Processing/DBAs                      |   |                     |
|                | Create US/UK/AU Phone #'s - Send to BRB Team                    |   |                     |
|                | Scripting/Recordings  |   | 2 weeks from launch |
|                | OCO - IVR Prompt Setup  |   | 2 weeks from launch |
|                | Web Cancel Setup (ask Chris for product images)                 |   | 2 weeks from launch |
|                | Create/Implement Event Codes                                    |   | 2 weeks from launch |
|                | QA/Testing on IVR, Web, Event Codes                             |   | 2 weeks from launch |
| Kayla/RevLive  | QA CSR Prompts  |   | 2 weeks from launch |
|                | Confirm CSRs are trained & ready for calls                      |   | 2 weeks from launch |

**Brooke Nelson**

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**From:** Brooke Nelson  
**Sent:** Thursday, April 13, 2017 10:45 AM  
**To:** 'John DeWitt'  
**Subject:** RE: Brain-Aid Intro Launch Follow Up - Action Items

**Categories:** Follow up (Action item)

Hi John,

I hope you are having a great week!

As a brief follow up, I wanted to see if you could answer the below questions. The answers will help me to understand your campaigns in more detail so I can make suggestions pertaining to the refund policy and offer maps going forward as we get closer to launch.

**Desired Rev Refund %**

- *What is your desired revenue refund percentage for your campaigns?*

As a follow up to the above question:

- *Do you plan to rebrand your products often (every 3-6 months) or is the goal of these campaigns longevity within the market?*

**MID Portfolio**

- *How many MID's do you currently have?*

The number of MID's you have will also help me determine the best suggestions for your campaigns.

All the best,  
Brooke

\*\*\*\*\*

**Brooke Nelson**

Customer Success Manager  
RevLive, LLC  
O: (720) 897-8396  
C: (720) 412-2147  
[Brooke@revlive.net](mailto:Brooke@revlive.net)  
Skype: [Brooke@revlive.net](https://www.skype.com/people/Brooke%40revlive.net)

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**From:** Brooke Nelson  
**Sent:** Monday, April 10, 2017 8:42 AM  
**To:** 'John DeWitt' <drjohndewitt@gmail.com>  
**Subject:** RE: Brain-Aid Intro Launch Follow Up - Action Items

Good Morning John,

Thank you for the update and if I can do anything on my end to simplify the process for you or assist in anyway, please do not hesitate to let me know. I know how those 12-hour days go and I'm sure you leave still feeling that there aren't enough hours in a day! Please let me know if or how I can help.

All the best,  
Brooke

\*\*\*\*\*

**Brooke Nelson**

Customer Success Manager

RevLive, LLC

O: (720) 897-8396

C: (720) 412-2147

[Brooke@revlive.net](mailto:Brooke@revlive.net)

Skype: [Brooke@revlive.net](mailto:Brooke@revlive.net)

**From:** John DeWitt [<mailto:drjohndewitt@gmail.com>]

**Sent:** Monday, April 10, 2017 8:38 AM

**To:** Brooke Nelson <[brooke@revlive.net](mailto:brooke@revlive.net)>

**Subject:** Re: Brain-Aid Intro Launch Follow Up - Action Items

Hi Brooke,

I realize a CRM is necessary to work with RevLive. I am currently working 12 hour days at the office so it's challenging to get everything done in a timely fashion. I will let you know once things start falling into place and realize the team needs a week to prep for the launch.

Thanks  
Dr DeWitt

On Thu, Apr 6, 2017 at 9:21 AM, Brooke Nelson <[brooke@revlive.net](mailto:brooke@revlive.net)> wrote:

Hi John,

It was a pleasure speaking with you and I enjoyed getting to know more about your Brain-Aid Campaigns. Below, I have included several items for your review and consideration. At the end of this email I have included a short bullet summary of the action items, since I know there is a lot that is discussed here! If there are any questions along the way, please feel free to reach out.

## RevLive Portal

- Just as a reminder, our agents do not work directly through the CRM but will work through the RevLive Portal. This is why it is important to have a CRM that we can integrate as we will need to be able to configure the Product / Campaign ID's from the CRM in order to locate customer orders within the RevLive Portal.
- We can get RevLive user access to you or anyone you request, so please feel free to shoot me an email when ready.

- When updates are made to product ID's within the CRM, our agents will not have access to the customer orders under these ID's until the product ID's are also updated internally within the RevLive Portal.
- Three CRM's that we recommend and can integrate easily with are: Konnektive, LimeLight, and Triangle. I am not familiar with the cost of these CRM's but know that we have clients that see great success using these three.
- Once you decide on a CRM, I will create a shared google doc where we can house all of your Product / Campaign ID's so that as these are added and updated, you can add the changes and we will ensure they are updated correctly on the RevLive side.

## Fulfillment

- You are using RAPID as your fulfillment center
  - We like to establish a direct point of contact at RAPID to ensure that we have access to internal resource channels when troubleshooting issues.
    - *You indicated Michael Ross will be our best point of contact – can you please provide Michael's contact information*

## Email Verification Services

Below, I have included a list of items that we recommend providing customer email alerts for. I know that you said you are still working with your processors to determine these. *Once decided, can you please let me know which items you are sending alerts for:*

- **Cancellations**
- **Refunds**
- **RMA's**
- **Save Sales (In trial saves used to gain revenue for the trial product the customer has received)**

## Threat Policy

We have the ability to set up a threat policy for when customers use certain buzzwords (threats). Below are two examples of common policies used to help mitigate chargebacks:

- We offer different threat policies depending on the words you identify as your "buzzwords" and the steps you would like taken once "buzzwords" are used. Two examples of successful threat policies that we offer include:
  - **Policy 1:** Customer is issued an immediate 100% refund, if a threat is used by a customer with your selected buzzwords.



- o **Policy 2:** Customer is offered and issued a 50% refund before offering a 100% refund, if a threat is used by a customer with your selected buzzwords.

§ *Policy description:* Offer a refund of 50% if buzzword is used -- if customer is not satisfied, refund 100%

- *I suggest if using typical online affiliate traffic, Policy 2 is a great way to help mitigate chargebacks without giving away as many refunds as Policy 1 will. Please let me know if you are interested in implementing either threat policy.*

## Buzzwords

| Lowest Recommendations | Medium Recommendations | Highest Recommendations     |
|------------------------|------------------------|-----------------------------|
| BBB                    | Citizens Attorney      | Bank/Chargeback/Credit Card |
| Social/Online Media    | Congressman/woman      | Police/Authorities          |
| News/TV                | Government Agencies    | Attorney General            |
|                        | FBI                    | Lawyer/Lawsuit              |
|                        | Consumer Council       |                             |
|                        | FTC                    |                             |

There are many different buzzwords you can choose to have as threats. Here are some of our recommendations:

- *Please let me know if you would like to have a threat policy, and if so, which threats you would like to qualify.*

## Traffic

It is helpful for us to understand where your traffic is coming from so that we are able to make appropriate changes to your campaign.

- o *If possible, do you know if you are using survey traffic?*
- o *If possible, do you know if you are using Facebook traffic?*

## Multiple Handle

We offer different agent solutions when handling multiple client brands/products. For example, your book will be offered as an upsell so therefore a customer may have two different products at the time that they are contacting our agent: Brain-Aid Supplements + Book. Please review the below policy descriptions:

- **Proactive Multiple Handle (recommended):** An agent will handle multiple brands/products per each call and will assist all other brands the customer may have purchased. With this option, our agents would directly ask the customer on each call if there are multiple products they can assist with. This is one of the best ways to help mitigate chargebacks.

- **Normal Multiple Handle:** An agent will handle multiple brands/products per each call but will NOT directly or actively assist the customer with any other brands. If the customer does not mention additional products, the agent will not ask or assist with these. This will raise chargebacks/complaints significantly but will dramatically lower refund numbers. I recommend this with a large, strong MID portfolio.

- *Can you please confirm on which multiple handle policy would you like to use for your campaigns?*

## 60 Day Money Back

You mentioned that the Brain-Aid supplements will have a 60-day money back policy. We do have several clients who offer a 30-day money back guarantee, so I believe your campaigns would be most successful following a similar model.

Although your policy is that any customer can receive a refund within 60-days, we want our agents to try to save the sale first before offering a 100% refund as this result does not produce any revenue for you. I have included some examples of offer maps and policies that we have found successful with your model.

### **Offer Map Suggestion for your Membership Offer for \$59.98/month for 2 bottles of 30-day supply Brain-Aid Supplements**

Reduced Continuity: This offer would be made first in attempts to keep the customer on the membership a lower price

1: Reduced Continuity – Membership offered at discounted %

- *Please let me know if you would like this type of offer included in your offer map. It's a great option for customers who like the product but can't afford the \$59.98/month – it also results in a saved sale*

Clean Cancel: This offer would be made if #1 was rejected. This offer (if accepted) would cancel the customer membership and any future shipments but not provide any refunds.

- *All of our clients use this as an offer*

*Partial Refunds: We have some clients who like to offer 35% and 50% (or even 75%) refunds to customers before offering the 100% refund in attempts to save the sale. We can offer just a 50% and then 100% or any combination of these percentages before offering the 100% refund.*

**3: Refund - Refund Percentage : 35 –**

**Refund - Refund Percentage : 50**

**Refund - Refund Percentage : 75**



*For the 100% refund offers we have two options: Return or Refund. How we process this 100% is going to depend on if you want the customer to return the product(s) before receiving a 100% refund or if you want this refund to be issued immediately, which means the customer keeps the product at no cost.*

*Some of our clients who offer bottled supplements have a factory sealed / unsealed policy. For example, if the product is factory sealed then we issue a Return as the product could be returned and reused and if the product is not factory sealed we issue a refund as the product is already opened and has been used.*

**4: Return - Refund Percentage : 100**

**4: Refund - Refund Percentage : 100**

## **Offer Map Suggestion for your Straight Sale \$79.98 Offer for 2 bottles of 30-day supply Brain-Aid Supplements**

We could use a similar offer map to the one suggested above however this offer map would exclude the reduced continuity offer as these customers will not be paying for a monthly membership.

## **Return Multiple Packages**

You will need to decide how you want to handle scenarios where customers are calling and requesting to return multiple packages. For example, a customer could have placed two straight sale orders a month apart and is now requesting a refund on both orders. Another example, a customer has the membership and wants a refund on 3 months of membership.

Our client response varies on this, some clients allow multiple packages to be returned and some do not.

### **Below is a common policy clients use:**

Multiple packages can be refunded within a 30 day time period (For example, if 2 straight sale orders were placed within 30 days and customer is requesting a refund on both). A refund between 31-45 days will require a supervisors approval (this would be escalated to our supervisors). Any return 45+ days will be escalated to corporate (this would be you, John).

- *Please let me know what type of policy you want to set for this*

## **Same Day Cancellations and Voids**

*If a customer contacts us and would like to cancel or void their order within 24-hours of when the order was placed, do you want this to be allowed?*

- If you decide to accept same day voids/cancellations, the customer will be provided with a 24-hour window to void purchase (this will be displayed for a 24-hour period only and will not be available in the offer map for our agents to see or offer after this time)

- If accepted, we will send an automated email alert to our point of contact at RAPID in addition to yourself each morning at 8am EST, which will include same day voids/cancellations for them to remove from their batch.
- *Can you please let me know how often and at what time(s) you will batch your orders to fulfillment?*

## Reship Services

You will receive automated email alerts as reship orders are requested. This automated alert will be sent daily at 8 pm EST. We offer the ability to handle and place the reship fulfillment orders for you:

- In this service, a high level supervisor will handle and post the reships/new orders correctly in the CRM for you. They will insure these are being batched to fulfillment. We charge for this service \$1.00/reship.
  - *Are you interested in using this service? We have the ability to continue sending nightly alerts to monitor how many reships are being placed daily, if any.*

## Address Verification Services

We can work directly with your fulfillment team to update addresses that are on hold and waiting to be shipped out. Clients using this service have indicated that for every 1 successful address update, the customer lifetime value is worth more than 10 attempts. This service is \$2.00/address and includes:

- 3 days of customer callbacks to verify address
- Updating fulfillment center with saved address or the removal of address

- *Are you interested in using this service?*

## Disclosures

I will send these to you for approval as we get closer to your launch date. There is already a lot of material in this email and many decisions for you to make. Once we start narrowing down some of the outstanding information, we can address these. This is a lower priority item.

### **Brief Summary on Bullets and Questions Asked:**

Fulfillment – Point of Contact Information

Email Verification Services – Confirm which alerts are sent

Threat Policy – Confirm Policy Choice

Buzzwords – Confirm Buzzwords Choice

Traffic – Confirm Type

Multiple Handle Policy – Confirm Policy Choice

60 Day Money Back – Confirm offers wanted

Return Multiple Packages – Confirm Policy

Same Day Cancellations / Voids – Accepted? Batch frequency / time

Reship Services – Would you like to use this service

Address Verification Service – Would you like to use this service

All the best,  
Brooke

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**Brooke Nelson**

Customer Success Manager

RevLive, LLC

O: (720) 897-8396

C: (720) 412-2147

Brooke@revlive.net

Skype: Brooke@revlive.net

## Blue Rocket Brands

**Refund Policy:** WaveRock (Action Pro White, Bella at Home, Blizzard White, Dental Pro at Home, First Class Whitening, Ivory Pro, Sedona Beauty Secrets, Skinny IQ, Smile Pro Direct, Spark Whitening, Titan White)

Chargeback Sensitivity: Medium/HIGH

Can offer Partial refunds for escalated, persistent customers without threats

Instant Full Refund If Bank Rep is on the Line: YES - For customers who have a bank rep on the phone with them, regardless of VbV status, please offer them a full refund to be processed immediately. This applies to accounts past 30 days.

60/40 Return: NO

Refund if over 30 days: YES, but no refunds over 6 months old unless bank rep is on the phone

Refund multiple packages: NO

Return Deadline: 15 days

Instant Full Refund for Threats: YES – follow A, B, C, and D. (THESE ARE DIFFERENT)

Valid Threats - (AG, Bank, BBB, FTC, Lawyer/Lawsuit, Police/Authorities, Visa/Mastercard/Discover, Card Issuer, Chargeback, Fraud)

A. If a customer is making valid threats, ALL Save Sales **MUST** be made before the 100% Refund.

1. DO NOT PUT "customer did not make valid threats" in notes, put "Cust did not request refund" instead.

2. IF threats were made use Checkboxes for Threats, and choose Threat Type.

3. Do not list threat type in notes. Checkboxes and dropdown are all that's needed for this brand.

B. If a customer accepts a save sale and does not make any new threats, do not make further offers.

C. If all Partial refunds are declined and threats are still being made, offer the RMA.

D. If the customer is still threatening after an RMA full has been offered, issue an immediate refund. Use the Post Trial 100% refund option within the RevLive system to execute the immediate refund.

\*\*\*Update for vBv and non vBv as of 6-24-2014:

For customers who threaten AG/BBB, Bank or Chargeback on the call, regardless of VbV status, please offer them normal refund options. This applies to accounts past 30 days.

Instant Full Refund If Bank Rep is on the Line: YES - For customers who have a bank rep on the phone with them, regardless of VbV status, please offer them a full refund to be processed immediately. This applies to accounts past 30 days.

60/40 Return: NO

Refund if over 30 days: YES, but no refunds over 6 months old unless bank rep is on the phone

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